

VA's Release 3 EDI Implementation Attorney Conference

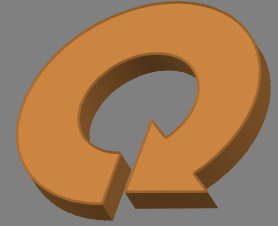


**Virginia Workers' Compensation
Commission**

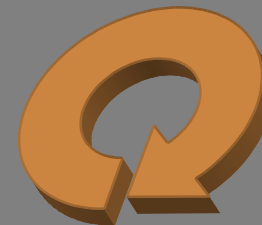
Technology Alignment Program (TAP)

5/26/2009

Agenda



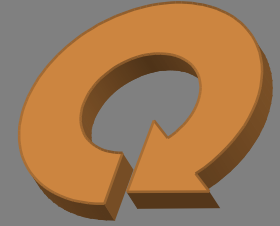
- **Welcome & Opening Comments**
- **Judicial Case Management Project Overview**
- **WebFile System Demonstration**
- **Summary of Planned Functions for Attorneys**
- **Q&A With Commission Panel**
- **Reception**



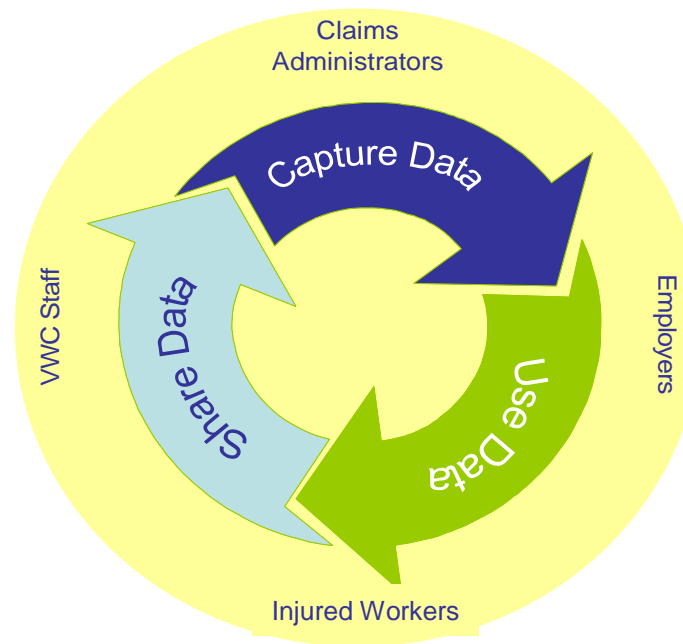
Part I

Welcome & Opening Comments

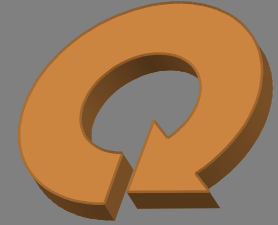
Vision



The Technology Alignment Program (TAP) is aimed at leveraging industry available technology to improve the overall efficiency, reliability and accuracy of information transactions, thereby greatly improving customer service and better meeting the needs of internal and external stakeholders.



The Phased EDI Implementation Plan for Carriers is complete



All reporters are required to report workers' compensation information (Release 3 FROI and SROI) electronically to the Commission by July 1, 2009.

Wave A – October 1, 2008

The following entities will submit via EDI claims that occur on or after October 1, 2008:

- Beta Testers
- Carriers filing greater than 1,000 non-minor claims annually

Wave B – December 1, 2008

The following entities will submit via EDI claims that occur on or after December 1, 2008, and will also have to retroactively submit via EDI all claims made between October 1 and November 30, 2008:

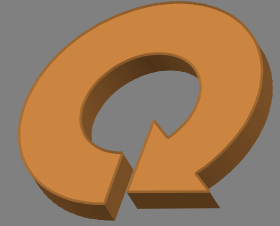
- Carriers filing between 100 and 999 non-minor claims annually

Wave C – March 1, 2009

The following entities will be required to submit electronically claims that occur on or after March 1, 2009:

- Self-Insurers that are self-administered (submit via EDI if annual volume greater than 100 non-minor claims)
- **WebFile** Reporters (Carriers that submit fewer than 100 non-minor claims annually)

TAP Milestones



EDI Start for High Volume Filers – October 1, 2008 ✓

EDI Start for Medium Volume Filers – December 1, 2008 ✓

Paperless *Proof of Coverage* filings (via NCCI) – February 1, 2009 ✓

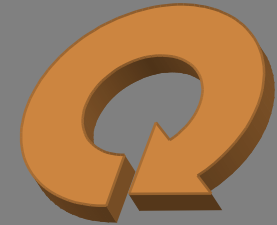
EDI Start for Sub-100 Filers (via **WebFile**) – March 1, 2009 ✓

Case Management for all EDI Filers & Claimants (via **WebFile**) – April 2, 2009 ✓

VA Mandate for All Filers to file via EDI – July 1, 2009

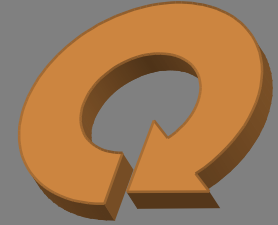
Litigation Management for Attorneys (via **WebFile**) – November 2009

WebFile Phase I – FROI/SROI for Small Volume EDI Filers



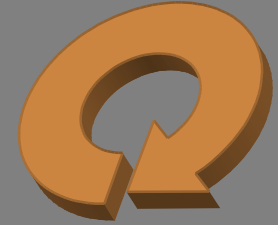
	Phase I	Phase II
Target Audience	Sub-100 Claim Administrators	All Claim Administrators (including Sub-100 Filers) & Claimants
Key Functions	<ul style="list-style-type: none">• Filing First Reports of Injury• Filing Subsequent Reports of Injury	<ul style="list-style-type: none">• Reviewing the Status on a Claim• Filing Forms and Documents, such as<ul style="list-style-type: none">- Claim for Benefits- Employer's Applications- Agreement Forms
Timeline	March 2, 2009	April 2, 2009

WebFile Phase II – Claims Management for All EDI Filers and Claimants

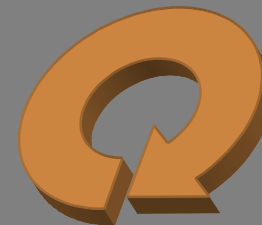


	Phase I	Phase II
Target Audience	Sub-100 Claim Administrators	All Claim Administrators (including Sub-100 Filers) & Claimants
Key Functions	<ul style="list-style-type: none">• Filing First Reports of Injury• Filing Subsequent Reports of Injury	<ul style="list-style-type: none">• Reviewing the Status on a Claim• Filing Forms and Documents, such as<ul style="list-style-type: none">- Claim for Benefits- Employer's Applications- Agreement Forms
Timeline	March 2, 2009	April 2, 2009

Current WebFile Roles



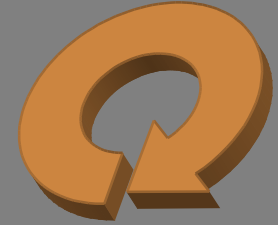
External WebFile Roles	Responsibilities
Site Administrator	As an employee of an approved Claims Administrator Organization, manages access to the Commission's <i>WebFile</i> system
Claim Manager	Can assign access to claims administrators, as well as fulfill CA responsibilities in <i>WebFile</i>
Claim Administrator User	Can view assigned claims and execute relevant transactions
Claimant	Can view and manage own claim, to include filing Claim For Benefits and Requests for Hearing in <i>WebFile</i>
Commission WebFile Roles	Responsibilities
Compliance Clerk	Manages <i>WebFile</i> <u>Site Administrator</u> access requests (not user requests)
System Administrator	Provides technical support for <i>WebFile</i> to Site Administrators only



Part II

Update on the Judicial Case Management Project & *WebFile* Demonstration

WebFile Phase III – Case Management for Attorneys



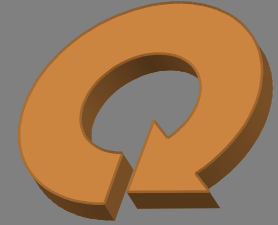
	Phase III
Target Audience	Attorneys
Key Functions	<ul style="list-style-type: none">• Web-based Case Access• Electronic Filings• Electronic Notifications• Uploading Case Documents
Timeline	November 2009

WebFile Phase III – Program Milestones

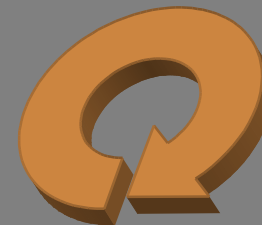


- Design/Development *April 2009 – Early September 2009*
- Final Testing *September 2009*
- User Training *September – October 2009*
- Go Live *November 2009*
- Implementation Support *Ongoing, Post Go Live*

Summary of Features in Today's WebFile Demonstration



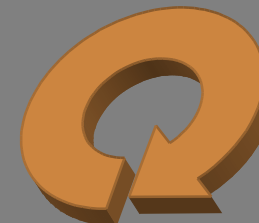
Functions List	Functions List
Log in With Claimant Account	Log in with Claim Administrator Account
View Claim Summary and Details	Link Claim to an Account
View PDF Image of uploaded doc	Search for Claim
View Document & Filings Tab	View PDF image of Claim Form
Make New Submission (upload doc)	Submit Claim Form/Request for Hearing web form



Part III

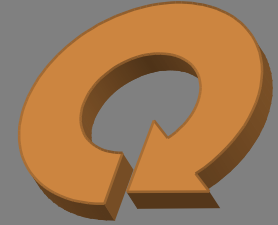
Summary of Planned WebFile Functions for Attorneys

Expanded WebFile Roles



External WebFile Roles	Responsibilities
Site Administrator	As an employee of an approved organization (which includes law firms), manages access to the Commission's <i>WebFile</i> system
Claim Manager	Can assign access to claims administrators, as well as fulfill CA responsibilities in <i>WebFile</i>
Claim Administrator User	Can view assigned claims and execute relevant transactions
Claimant	Can view and manage own claim, to include filing Claim For Benefits and Requests for Hearing in <i>WebFile</i>
Attorney	Views and manages relevant case files in <i>WebFile</i>
Commission WebFile Roles	Responsibilities
Compliance Clerk	Manages <i>WebFile</i> Site Administrator access requests (not user requests)
System Administrator	Provides technical support for <i>WebFile</i> to Site Administrators only

Benefits of Planned *WebFile* Functions for Attorneys



Web-Based Case Management

- Immediate verification of actions taken on a case file
- Distributed but controlled case file access within your organization
- Self-service capability

Accessing a Complete Case File

- Case history available
- Full document set viewable and printable at all times
- Summary of key events in the dispute
- Summary of contact information

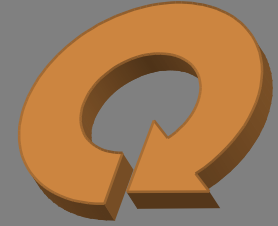
Electronic Notifications

- View Hearing Schedule
- Immediate e-mail notification of changes
- Reduced paper notifications

Upload Documentation

- Reduced postage costs
- Handles requirement to copy opponents on filings
- Immediate verification of submissions

Impact to Existing Processes and Skills



Managing Documents

- Scanning documents
- Creating PDFs
- Displaying documents using a projector
- Uploading files

Internet Explorer Skills

- Using Portlets
- Browser Navigation
- Search

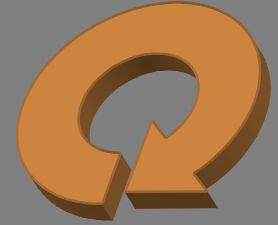
Equipment

- Scanner
- PC/Laptop
- Wireless network adapters

Software and Applications

- PDF Creator (often done through printing process)
- Email Account
- Internet Access
- Internet Explorer
 - IE Version 7 or later
 - Mozilla Firefox Version 3 or later

Planned Changes for Hearings



- Evidence submission will remain on paper
- Basic hearing process has not changed
- Wi-Fi Connections are being established
- Process for displaying of non-paper exhibits is being designed

Options for Electronic Notifications



- Options for Electronic Notifications will be available, to include
 - How Opponents will be copied
 - Summary of Notifications
 - Receipt of Opinions

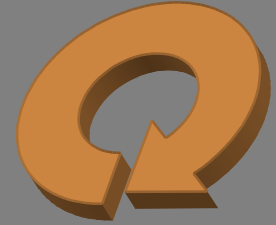
Electronic Filings – Planned Web Forms



- Claim Form / Request for Hearing
- Attorney Fees Application
- Employer's Application
- Medical Provider's Application
- Request for Mediation
- 20-Day Order Response
- Request for Cost of Living Adjustment

There are also plans to display “Submitted by <User ID>” on signature line for web forms.

Electronic Filings – Document Upload



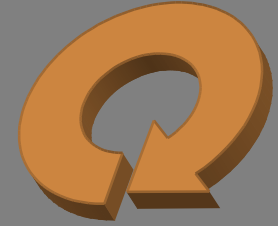
- Covers process for scanning or attaching documents, including
 - Motions
 - Correspondence
 - Medical Records
 - Petition & Order packages
 - Miscellaneous Forms

Access Management Process



- Governs functions which manage levels of access to WebFile, including
 - Site Administrator access rights and responsibilities
 - Attorney access rights and responsibilities
 - How to notify “Representation” on a claim
 - Co-Counsel arrangements
 - Delegation to Paralegals

Eastern District Opinion on Paralegals



United States District Court - Eastern District of Virginia Electronic Case Filing (E-Filing) Policies and Procedures

Delegation of Authority to Use Login and Password

Attorneys may allow a secretary, paralegal, or other person in their office to use their login and password to file documents on their behalf.

However, attorneys should remember that

- their login and password constitute their signature, regardless of whether they personally use the login and password or delegate that authority to someone else.
 - they are responsible for safeguarding and protecting their login and password at all times.
-

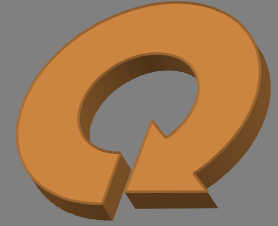
Additional Demonstrations Available



During the break, Commission Staff will be stationed at 4 kiosks around the Ballroom to

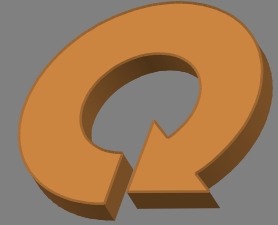
- Provide a closer look at the current system
- Answer questions not addressed during the group demonstration
- Focus on specific functions of interest to you

Getting Ready



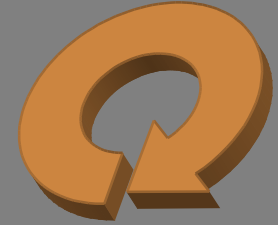
- Consider the impact to your organization in terms of
 - Who may need to be your **WebFile** Site Administrator
 - How your organization may need to adjust
 - New skills
 - New equipment
 - Modified processes and responsibilities

Final Suggestions for Attorneys



- Attend future sessions about this initiative targeted at Attorneys
 - June Meeting (date tbd)
 - Training Sessions (Late Summer '09) in Richmond and Regional Sites
- Stay tuned to Commission Communications
 - “Attorney List” emails
 - Monthly JCMS Newsletter
 - EDI Initiative Website

Summary of FAQs Gathered So Far



- 1) **Why can't attorneys use WebFile now? Aren't attorneys at a disadvantage since Claimants can use it today, but attorneys cannot?**

Answer: The attorney role is fairly complex, so the Commission has established a separate project to design and implement this enhancement to WebFile. Using existing processes, attorneys may still access the same case record that a Claimant can now view online.

- 2) **Will hearings be paperless?**

Answer: There is no requirement that hearings be paperless.

- 3) **How will WebFile assist us with adhering to Rule 4.2 to file medical records?**

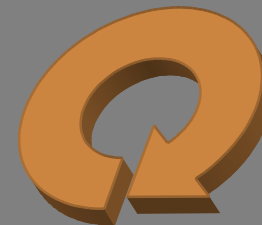
Answer: WebFile will be able to handle the upload of medical records, with some limitations due to file size. You can also verify that files have been uploaded by viewing the "Documents and Filings" tab in the system.

- 4) **Once attorneys have access, will Claimants still have the same access they have today?**

Answer: Yes, Claimants will still have the same access to make filings, which they can now make today using paper and internet processes.

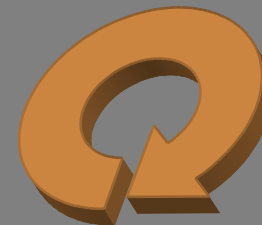
- 5) **Will we be able to file briefs electronically?**

Answer: Once converted to PDF, briefs may be filed electronically. Users will be able to submit a host of documents either by uploading scanned PDFs, or submitting information through web forms. Details for this process are being designed now.



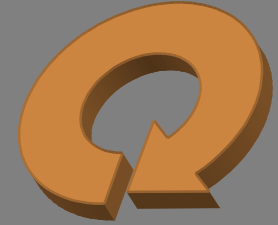
Part IV

Q & A With Commission Panel



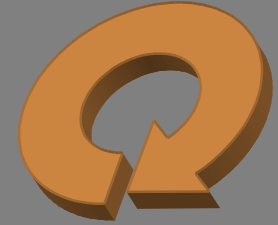
Appendix

What We've Told Claim Administrators



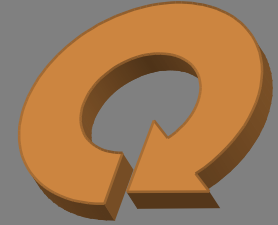
- 1) **WebFile** can be used by all EDI filers
- 2) Site Administrators manage their organization's users - the Commission's point-of-contact is an organization's **Site Administrator**
This will be true for attorneys as well; all can use, but each organization will have a single Site Administrator
- 3) Over 1,000 Claimants have logged in to **WebFile** since April 2, 2009
- 4) Attorneys – a key Related Party to a Claim – will use **WebFile's** Judicial Case Management Functions, in November 2009
- 5) **WebFile** requires Internet Explorer 7.0 or later, ***and will not work*** using Internet Explorer 6.0 or earlier

Additional Information



- View Webcast archives, General FAQs, Commission's EDI website
<http://www.vwc.state.va.us/EDI/EDInitiative.html>
- **Coming Soon:** Judicial Case Management System project site for Attorneys which will contain
 - Archived JCMS Attorney Newsletters
 - Latest Project Status and updates
 - Information on past/future meeting and training opportunities
- E-mail questions and comments to tapfeedback@vwc.state.va.us

Glossary of terms



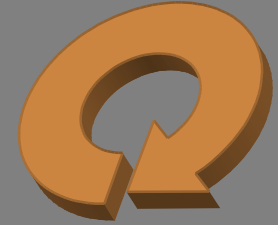
FROI – *First Report of Injury;*” A record sent to the jurisdiction to complete the jurisdiction's First Report of Injury (FROI) requirements. i.e. initial employer accident reports.

SROI – “*Subsequent Report of Injury;*” A record sent to the jurisdiction to complete the jurisdiction's Subsequent Report of Injury requirements. i.e. payment or denial of a claim.

Claim Administrator – The primary organization accountable for adjusting the claim and reporting claim activity via EDI to the Workers’ Compensation regulating agency. i.e. Insurance carrier, third party administrator, state fund or self-insured employer.

Trading Partner – An entity that has entered into an agreement with another entity to exchange data electronically.

Glossary of terms



MTC “*Maintenance Type code*”; A code defining the specific purpose of individual records within the transaction being transmitted. i.e. an “00” is the Original First Report of Injury.

A report (previously known as “form”) required by the jurisdiction to report an event. (injury, first payment, denial, etc.)

Triggers: Trigger criteria are the events that cause a particular report to be due for submission to the jurisdiction. For example, an accident “triggers” the requirement to file an accident report.

EDI – The abbreviation for Electronic Data Interchange; the system and methods by which carriers submit data electronically.

“Release 3” – The latest set of EDI standards issued by the standards-issuing body (IAIABC).

WebFile Home Page Screen Shot



VWC

Virginia Workers' Compensation Commission

Welcome to WebFile

Link: <https://webfile.workcomp.virginia.gov/>

Your location: Welcome to WebFile

Welcome to WebFile

Welcome to **WebFile**, the Virginia Workers' Compensation Commission's online claims management tool. **WebFile** has been set up so that, based on your role in the claims process, you can manage claim records and take care of key transactions online. Specific **WebFile** functions allow:

- Claimants to review their claim's history and protect their rights by submitting an online Claim Form and Request for Hearing if needed
- Small volume carriers to submit First and Subsequent Reports of Injury online
- All carriers to review their portfolio of claims and upload relevant documents, such as Employer Application For Hearing and Agreement Forms



If you are a carrier or self-insured employer, please download the [WebFile Guide](#), a comprehensive user manual that contains job aids, step-by-step instructions, and background information. E-mail questions, comments, and new Site Administrator access requests to webfilesupport@vwc.state.va.us. Those requesting Site Administrator access must provide the information listed at the right, under "WebFile Access." All other users must contact their Site Administrator to access the system.

If you are a Claimant, please download the [WebFile Guide for Claimants](#). This document provides specific instructions for how to log in, view your claim records, and file relevant forms. Please call 1-877-664-2566 if you have questions.

After logging in, you will see the "Help & Support" link, which allows you to access the same information while you are online that you can find in your *WebFile Guide*.

In order to access WebFile, you must use Internet Explorer version 7.0 or later which can be found here:
<http://www.microsoft.com/windows/products/winfamily/ie/default.mspx>.

WebFile Links

- [VWC EDI Website](#)
- [IAIABC Website](#)
- [VWC Implementation Guide](#)
- [WebFile Guide for Claimants](#)
- [WebFile Guide for Claim Administrators](#)
- [Instructions for submitting a report](#)
- [Which report do I need to submit?](#)
- [Terms and Conditions](#)

WebFile Access

Claimants: Please click the "Claimant Registration" link above to register for access to **WebFile** if you haven't already registered.

Site Administrators: If you would like to be setup as a Site Administrator, send an email to webfilesupport@vwc.state.va.us and include the following information:

1. Name of Organization

View Claim Records (Claimant View)



This covers the process for viewing a Claim Record after a Claimant has received a Notification of Injury, and a PIN letter.

My Web File Tools Claim Dashboard

My Claims

You currently have no associated claims. Please use the fields below to add one.

Associate A New Claim

PIN:

Last Name:

Jurisdiction Claim Number:

Injury Date:

Add

Claimants enter the JCN from the Notification letter

Afterward, a Claim Details section appears, covering Incident, Adjuster, Claimant, and Employer information

You have notified your Claim for Benefits. Please click [here](#) to do so.

Claimant: Joe Employee
Jurisdiction Claim Number: VA0000000963
Date of Injury: 3/23/2009
Employer: _TEST_LOGICAL CLAIM

Employee Social Security Number: ***-**-4567
Claim Administration Claim Number: 234543332
Claim Type: Medical Only
Insurer: BIG BOYS INSURANCE

Claim Status Overview

☐ Claim for Benefits Filed
☐ Claim Entered by Insured
☐ Payments Reported
☐ Award Entered by Commission

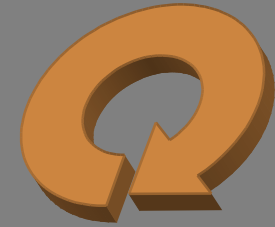
Claim Details Documents & Filings

Instructions

☐ Please contact the Claim Adjuster if there is any incorrect information in the claim.

Incident Details
Adjuster Details
Claimant Details
Employer Details

Documents and Filings Tab (Claimant View)




This covers the process for viewing documents associated with a Claimant's record.

Claim Detail **Documents & Filings** Submit Claim Form/Request for Hearing




All imaged documents for this claim are displayed below. Click the Document Type to view the document.

▼ Instructions

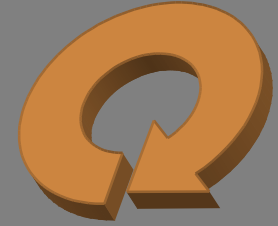
- ☐ You may bundle documents by checking the boxes to the left of the document name and clicking Create Doc Bundle at the bottom which will create a single PDF containing all selected documents on your computer. You may select items on multiple pages.
- ☐ pdf.download.instructions

 Get ADOBE® READER®

Imaged Documents: All imaged documents for this claim are displayed below. Click the Document Type to view the document.

	Document Type	Sealed	Description	Source
<input type="checkbox"/>	 Dispute Form	No	Employer's Application for Hearing	Web
<input type="checkbox"/>	 Assertion Of Rights	No	Assertion of Rights	Web
<input type="checkbox"/>	 Request For Hearing	No	Request for Hearing	Web

Filing a Claim Form (for Claimants)



This covers the online submission of the Claim Form.

My WebFile Tools **File Claim for Benefits**

► Filing Instructions: Claim Form/Request for Hearing (Step 1 of 2)

Injured Worker

Injured Worker Name
First Name ⓘ MI Last Name ⓘ Suffix (Sr, Jr, III)

Injured Worker Address
Street Address ⓘ

City ⓘ State ⓘ Zip Code ⓘ

Injured Worker Phone
Home Phone Work Phone (if any)

Employer

Employer Name
Employer's Name ⓘ

Employer Contact Information
Street Address ⓘ

City ⓘ State ⓘ Zip Code ⓘ

Phone (if known)

Incident

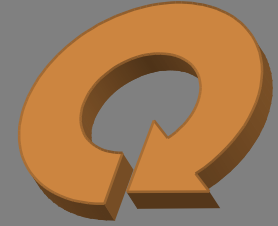
Parts of Your Body Injured ⓘ

Date of Injury ⓘ
 ⓘ

Average Earnings per week ⓘ

*Claimants access the
online Claim Form from the
“File Claim for Benefits” tab*

Complete a Request for Hearing online (for Claimants)



This covers the online submission of a Request for Hearing.

Request for Hearing

You are not required to complete this section. Do so only if you are requesting a hearing.

☐ An award for medical benefits for my injury (including any treatment already received & paid for)

☐ I missed work because of my injury on (dates)

☐ I earned less pay because of my injury on (dates)

☐ I have a loss of or loss of use of a body part or have disfigurement.

☐ I have unpaid medical bills relating to my injury.

☐ Other

Medical Record / Bill Attachments

You can attach any documents that support your request for hearing here. Your request will be processed more quickly if you attach them now. If you are unable to attach them now, please go ahead and file your claim and mail the supporting documents to the Commission at 1000 DMV Drive, Richmond, VA 23220, and write your Jurisdiction Claim Number (JCN) on the top of the first page. Please contact the Commission at 877-664-2566 if you need help getting these records.

Supporting documents include medical treatment records, work excuse slips, and job search lists if you are partially disabled. Please do not submit billing records or doctors invoices.

File(s) must be Non-Encrypted PDFs

Disclosure & Agreement Form

☐ By clicking "submit" I am indicating that the information is correct to the best of my knowledge and that I wish to file the record with the Commission.

The Request for Hearing allows Claimants to provide relevant details

And to attach relevant records